Help Desk Demonstration
CMS Net User Group Meeting
September 3, 2002

Transfers:

Transfer/Active status is to be entered by the County being left. Transfer/Active status allows the system to generate Transfer letters. If it has already been determined that the family has moved to a new county then the two counties must agree on a closure date. The old county will close the case so the new county can access the patient registration face sheet and change the status to Reopen Pending.

- If there is a signed PSA, the old county should enter the closure for the date agreed on through the Client Eligibility screen.
- If there is no signed PSA, then the old county should correct the program end date on the program eligibility screen to reflect the same date as the closure prior to closing the case.

After changing the status to Reopen Pending on the Registration face sheet, the new county should access the Eligibility screen for the patient.

- If there is a signed PSA, the new county will access the current period and go to Client Eligibility and change the Elig Start date to reflect the date their county will take responsibility for the case. (This should be the day after the date the old county entered as the closure date.)
- If there is no signed PSA, the county will access the Eligibility screen and establish a new period for the incoming tranfer case.

Ticklers:

- PEND

The Pend tickler is set when the first Pending Elig letter is sent from the Pending Elig screen. The case will remain on the PEND tickler until Financial and Residential Eligibility is determined and noted on the Financial and Residential Worksheet screens. If a Pending Eligibility letter is generated after these two screens have already been saved with an "Eligible" status, the case WILL REMAIN on the PEND Tickler list. The only way to remove the case from the PEND tickler is to go to either the Financial worksheet or Residential worksheet screen and resave the "Eligible" status.

- PSA

The PSA tickler is set when a PSA is generated by selecting "SIGNATURE PENDING" in the PSA STATUS field on the PROGRAM ELIGIBILITY screen. The tickler is released by returning to the PROGRAM ELIGIBILITY screen and at the PSA STATUS field selecting and saving one of the other 3 options: Signed, Not Signed, or Not Required.

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Here are answers to a few questions submitted to the Help Desk by users:

1. Aid code: When to modify & when to change/close out aid code.

   Use modify when the Aid Code was entered incorrectly initially. This is the only exception I can think of. If the aid code was entered in error then you should edit it.

   Use close and reopen when the aid code changes. For billing purposes history needs to reflect Aid Code A from (start date to end date) and Aid Code B from (start date to end date).

   If the aid code changes during the program period (say for example the client had Medi-Cal and then was no longer eligible) then you should close the case, select "aid code change" as the reason and then save. Selecting "aid code change" takes you back to the Client Eligibility screen where you are directed to change the status to "Active" and select the correct new aid code. This information along with the effective dates gets sent in a HAP file to MEDS. Once E47 is completed and claims are paid directly, having the correct aid code with the correct effective dates will ensure that the claims get paid with the right funds.

   One more important piece of information to note is that when you close the case, you should select an effective date in the past. If you select today's date you will not be able to enter the new aid code until the next business day.

2. Auths: When to use modify and when to use extension, when to enter new?

   Use MODIFY when making a change to an existing request, for example; Vendor name, ICD 9 code, incorrect begin and/or end date. Use modify request when request is not yet authorized. Use Authorize request to modify a request that has been authorized.

   Use EXTENSION when the request has been issued and is correct as is but a new request for a later time period is being requested. Use Enter Request.

   Extended requests will use the original request number with a letter extension, i.e. 123456= original request, 123456A = extended request. Modified request will be designated with a semicolon and number, i.e. 123456 = original request, 123456;1 = modified request.

   PLEASE NOTE when re-printing an authorized request on the "Print Authorized Request" screen you will only enter the first 6 characters of the authorization number. The system will select the correctly modified or extended request based on the print date you enter.

3. What field clears the financial tickler? Some say signed PSA, others say program end date.

   Okay, I am assuming that we are talking about the PFIN (Pending Financial Determination Tickler).
   Patients are placed on the tickler when “PENDING FIN DET” is entered on the financial worksheet. Making the financial determination “Eligible” or “Ineligible” clear the tickler on the Financial worksheet.

4. Under "client eligibility" Elig Start Date: - When is this date to be changed if at all?
   The “Elig Start Date’’ field is entered when a case is made active. If the date is entered incorrectly it can be changed on the Client Eligibility screen. It would also need to be updated if a) the case is closed and reopened, b) transferred, or c) the aid code changes.

Frequently Asked CLIENT ELIGIBILITY Questions

Q. How come I can not enter an eligibility begin date?
A. Check the display eligibility log. There is a date for that period in history. The system will not allow overlapping dates.

Q. Why does the F/R on header say ineligible when I have completed all the necessary screens?
A. Check payment status. If it displays “payment not recvd in full” – remove it. That status should only be entered if the final due date is in the past.

Q. Why aren’t my eligibility statuses displaying in the header.
A. . Because the eligibility begin date is in the future.

Q. What if I want to open for DX only. What do I put in pending eligibility?
A. The status should be elig period only.

Q. How do I look at eligibility history?
A. Go to the display eligibility history log from the primary menu.

Q. What if I want to make an edit to a closed eligibility period?
A. You will have to call the help desk to request a data repair.

Q. What if the wrong program begin or end date has been entered?
A. Contact the help desk. They will need to do a data repair.